

ENTERPRISE CUSTOMERS OF SUMTOTAL SHARE HOW LEARNING SUPPORTS THEIR RETURN-TO-WORK STRATEGIES

For this investigation, 3Sixty Insights spoke with several enterprise-size customers of SumTotal. Specifically, these global organizations are users of the vendor's learning management platform. The following pages focus on their strategies and tactics in supporting learning in general and a return to work specifically. Each has solved for significant challenges in protecting the employee experience and preserving productivity as the world of work moved through the initial stages of a pandemic that rattled these concepts to their core.

What You Need to Know

Learning plays an enormous role in organizational stability. Whether it is for training, upskilling, reskilling and, ultimately, career pathing, an employer's learning platform is often the best vehicle for an organization to set goals for its people or have an effective impact on overall internal culture—together among the fundamental factors impacting the employee experience. It's certainly the sole efficient way to track compliance with the complex regulatory environment governing the employment of people. Over the past 19 months, meanwhile, the worldwide pandemic has exacerbated the always-pressing concerns around these same factors—training, compliance, upskilling, reskilling, and employer culture. During this time, naturally, organizations have leaned as heavily as ever on their learning management systems (LMS) and the content feeding these. This reliance has become acute, and related use LMSs methodical, as employers have navigated complicated scenarios to reestablish a semblance of normalcy as the world exits the onset of the pandemic. This pressure to innovate with regards to what being at work will look like long-term has produced or breathed new life into concepts such as re-onboarding, work-from-home (WFH), hybrid work, and more.

Common Challenges

An array of challenges common to large employers can impede their ability to advocate for, protect, and elevate the employee experience—which, everyone who participated in this investigation noted, was gaining in perceived importance long before lockdowns and other disruptive reactions to the pandemic. Shortcomings in their technological infrastructure constitute one such impediment. Data originating from a hodgepodge of systems sprawled across a large enterprise can beset organizations' efforts to gain a holistic view of the employee experience at any given point in time. From a technological standpoint, these same ecosystems struggle to accommodate the intensity and volume of communication that employers must cultivate to build and maintain a caliber of employee

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AT A GLANCE

Solution

SumTotal

Research Participants

General Electric
Cox Enterprises
Encore

Overview

3Sixty Insights spoke with customers of SumTotal to explore their strategies for returning to work amid the worldwide pandemic. Each user has taken a different route. This report includes the details and shares how their SumTotal deployments fit into the equation.

Findings

Different business models call for different return-to-work strategies. Whether the user elected to remain working from home exclusively, return to the physical workplace, or employ a hybrid model based on individual divisions' needs, SumTotal-facilitated on-the-job learning and training played an important part in helping to protect the employee experience.

experience that will attract the best people, stave attrition, and inspire innovation.

The size of large organizations' geographic footprint poses additional challenges. Even in so-called normal times, both the learning and rote training necessary for compliance vary widely. Says Rosellen Beck, head of global learning operations for General Electric, "Working in a global environment, we have so many different regulatory challenges to work through—different needs, and how those needs then stitch together to bring about success, whether it be the difference between a manufacturing employee in various countries, or a field service engineer, or someone in corporate."

General Electric

A member of SumTotal's customer advisory board (CAB), GE has been on the SumTotal learning platform for approximately 10 years. "We are part of every single possible design workshop, feedback session—it does not matter what it is. I've got somebody on it," says Beck. Three years ago, her team did away with an on-premises installation of SumTotal to migrate to the vendor's SaaS Extend, which means "we are one version behind at all times, allowing us for a longer runway for validation purposes."

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It's a validating system necessitated by the fact that healthcare is one of the verticals GE covers with its products. SumTotal is the system of record for learning at GE for a combination of about 200,000 employees and contractors in the system. GE is working to bring customers in, as well.

"My strategy is never to be on the bleeding edge of learning technology. I don't mind being on the leading edge, but not the bleeding edge. We are a highly regulated company, and everything is audited. The volume of regulatory and required training is significant." If GE's learning environment for compliance training isn't in order, "smooth, and easy, it doesn't matter what our employee experience is anywhere else. Some of our employees have to learn what the temperatures are to melt certain metals—that and the rules behind it for an airplane engine to withstand whatever is going to happen. Those types of trainings are critical."

Any employer's "learning system, to me, is always a canary in the coal mine," Beck says. From a theoretical standpoint, whereas employees may be in their email or desktop applications day in and day out, with "learning, employees are in the system just infrequently enough never to quite get the hang of things. Because they lack recurring experience with the system, they might abandon efforts

About SumTotal

SumTotal provides a unified, comprehensive learning and talent development suite for the entire employee lifecycle. The idea is for organizations to build cultures of learning critical to growth, success, and business sustainability. SumTotal's award-winning technology provides talent acquisition, onboarding, learning management, and talent management solutions across innovative, complex and highly regulated industries, including technology, airlines, financial services, healthcare, manufacturing, and pharmaceuticals. Along with Skillsoft, SumTotal partners with thousands of global organizations, including Fortune 500 companies.

RESEARCH NOTE

and complain if it doesn't work the first one or two times." Further affecting the employee's tolerance and patience for learning how to navigate the learning system is the type of learning in play—self-elected learning the employee wants to do versus mandatory learning the employee must do for compliance, for example.

Cox Enterprises

A global employer of nearly 50,000, almost all of whom utilize the SumTotal learning platform, Cox Enterprises exercised foresight in its learning strategy a couple years ago. After holding its HR Leadership Conference in 2018, Cox, the owner of well-known publications such as *Autotrader* and *Kelley Blue Book*, established an "employee lab where we took a human centered design approach to all of our processes, all of the touch points, all of the things that we were asking our employees to do—from how they receive or view their paychecks, through benefits, through learning, through career framework, through day-to-day HR operations, all of it," says Cliff Howe, senior director of learning solutions for the company.

As for the conditions the company had for assigning and tracking learning-related activity going into the pandemic, they were good. In 2017, the employer placed all its divisions on the latest cloud-based, software-as-a-service (SaaS)-delivered version of SumTotal, in the process effectively shutting down seven independently operating, long-in-the-tooth LMSs of various origins. One, for the division focused on publishing automotive-related content, was a much older cloud-based version of SumTotal. The new, consolidated ecosystem positioned Cox well for the unforeseen disruptions of the pandemic.

"Before moving onto one platform, we had some systems that were painfully out of support," Howe says. "We were running PeopleSoft LMS, and it was a daily event to have to do a hard reset on those servers. That's how bad it was." Another group contended with a suboptimal experience using an old instance of Taleo, and one division didn't even have an LMS. "We were just tracking the learning on spreadsheets. It really felt like the Wild West."

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Looking forward to a far more streamlined solution to ensure compliance, Howe and his team had a broader vision. "We wanted to drive enrollment in leadership and professional development programs" and benefit from newfound efficiencies "across division lines so that someone in our automotive-related business, for

Decisions

Each customer of SumTotal interviewed for this report made a different decision for its return-to-work strategy:

- Because of its business model based largely on live conferences and other in-person events, **Encore** has mostly returned to the workplace, but with room for flexible, hybrid work arrangements to align with attendant, evolving demand for virtual events.
- During the pandemic, **Cox Enterprises** learned that most of its workforce performs efficiently and at a high level from their individual computers. Cox has elected to remain mostly in WFH mode.
- With myriad lines of business globally, **General Electric** turned to the hybrid model and let each division make its own decision on how to move forward. Some have continued with WFH, whereas others needed employees to return to physical workplaces.

RESEARCH NOTE

example, could sit online next to someone in our communications business, who could sit next to someone from headquarters, and all three of those Cox employees could take the same course for professional enrichment.” The employer’s previous set-up of disparate LMS systems was a major impediment hindering efficiency and improvement in employee experience.

“SumTotal does a good job with its interest functionality,” Howe says. “Someone who’s just starting to use the system can indicate their interests. What then comes up is what we call a horizontal widget on their landing page to indicate they’ve selected such and such interests in a given subject matter area. SumTotal’s platform will suggest courses relevant to this and organized in a way similar to what we see in consumer-grade video-streaming apps today.”

Howe believes the combined concrete and abstract benefits of having one SumTotal learning platform in place is a big factor in enabling Cox to pursue its leadership’s mantra “to be one percent better than we were yesterday or last year.” In other words, a better technological ecosystem for learning in this instance supports a central tenet of Cox’s employer culture ([3Sixty Insights BWSRN2142 – Concrete vs. Abstract HCM: The Power of “And,” April 2021](#)).

Encore

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Rebranded under the name of Encore in early 2021, the business focuses on providing various core and behind-the-scenes staff and infrastructure—rigging, staging, audio soundboards, and the people putting together and operating these and other necessities—for business conferences and similar events.

Encore switched to SumTotal in 2015. “We were one of the first enterprise customers to jump onto” the SumTotal learning platform after the vendor’s merging with learning content provider Skillsoft that year, according to Derek Blake, divisional vice president of global learning and development at Encore and a current sitting member on Skillsoft’s executive advisory board. “Prior to that, we had a couple different companies within the family of Encore companies on different platforms, and we were at a spot to pull them all together.” One of those was an LMS from Cornerstone OnDemand supporting a couple thousand people.

Elaborating on Encore’s learning culture, Blake says, “We’re not, for example, in the financial space, the pharmaceutical space, or the health space, where systems are built around heavy compliance demands and requirements. Like any other organization, we



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Cliff Howe

Senior Director of
Learning Solutions
Cox Enterprises

have our compliance check boxes, but it's a very tiny percentage of the learning that we do. Our team has spent years marketing and talking about things like career development, systematizing career development, picking career paths, developing people on career paths, and doing certifications that equate to more pay, and doing things that are a value proposition for the team member. By our focusing on these things, our people want to do the learning, they find value in the learning, and they accelerate" their career advancement. It's an ingrained, high level of attention for the employee experience.

Diverging Circumstances, Decisions, Directions

Three models have emerged as businesses the world over have formulated plans to follow the first 19 months of the pandemic and their first adaptations to the immediate past's widespread lockdowns. Some have embraced the much-ballyhooed (or scrutinized) WFH model. Others have required that employees return to gathering in a conventional, common physical space (i.e., an office) or, out of necessity, a job site for the traditional five-day workweek. Still others have elected to adopt some combination of these two, a hybrid approach driven by logistics (e.g., the makeup of their workforce, which may consist of front-line employee contingents) or a philosophical predilection to be flexible.

Three models have emerged as businesses the world over have formulated plans to follow the first 18 months of the pandemic and their first adaptations to the immediate past's widespread lockdowns: work from home, return to the workplace, and hybrid.

Work From Home

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Compared to the other customers of SumTotal with whom 3Sixty Insights spoke, the decision for Cox on what to do next, as the initial stages of the pandemic waned, was relatively straightforward. Most employees immediately and readily transitioned to WFH at the onset of lockdowns, in March 2020. The company has since instituted a Flex Forward initiative, part of which involves asking organizational leaders and line managers alike the question, "Why does it make sense to work remotely?" notes Howe. "We've encouraged them to have conversations with their teams about how they're going to work together. The vast majority of our knowledge workers or office workers insist that they can do just as good of a job, if not better, remotely—with neither internal nor external customers knowing the difference. We believe them," and, because of this, Howe expects Cox to be largely a WFH business for the long term, potentially.



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Derek Blake

Divisional Vice President
Global Learning & Development
Encore

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Back to the Physical Workplace

Pre-pandemic, Encore had approximately 15,000 active employees globally. At the end of March 2020, “we still had the employees, but we did not have shifts or work for a large majority of them,” says Blake. The company rapidly moved roughly 75 percent of its people to furloughed status.

Encore’s run rate had plummeted to just 5 percent of its very healthy, immediate pre-pandemic level. Derek Blake, divisional vice president of global learning and development, credits the SumTotal learning platform’s flexibility in responding agilely to sudden disruption and in facilitating the targeted re-onboarding of these staff as a key component of Encore’s ability to survive and thrive through the ensuing many months.

During the pandemic, naturally, Encore heavily increased its focus on virtual events. From his perch, in the learning department, Blake saw the chance to make ground on projects that were always on the backburner. Additionally, “essentially all our customers were coming to us, asking how they could make a previously in-person event virtual. Doing virtual events was nothing new to us. We had the know-how.” Even so, “doing it that quickly, and with our team members on the bench, so to speak, was a huge challenge.”

Blake and his team were able to utilize the SumTotal platform to create learning sessions around virtual and hybrid skill sets, deploy these quickly, and scale them rapidly. “We went into crunch mode. We used the platform to upskill team members that hadn’t been furloughed,” most of whom were hourly, whereas the majority of team members left were salaried. “The salaried team members weren’t necessarily technically inclined. So, what we had to do was re-skill them to wear multiple hats. And the SumTotal platform allowed us to achieve this extent of training at scale, follow up on the training, hold people accountable to report, and really get ahead of things, literally weeks before any given event.”

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Rosellen Beck

Head of Global
Learning Operations
General Electric

RESEARCH NOTE

Because of the nature of its business, Encore is maneuvering to return significantly to the physical job site as the pendulum in the conference industry swings back to in-person events. At the same time, hybrid event models have existed for more than a decade, and Blake already sees the events of the past 19 months broadening interest in this, the melding of in-person and virtual events.

Flexible, Hybrid

GE set a date of Sept. 14, 2021, for employees to return to the company's physical offices. At its core, however, the approach at GE has been the flexible, hybrid model from a global standpoint ever since lockdowns began. "Many offices worldwide have been open throughout the entire pandemic," says Beck. "It's just been built based on your work, and your department and the location. The requirement of returning to work starting September 14 is United States-specific, but we will adhere to country guidelines." In the United States, "we will adhere to city guidelines, regional guidelines. Those supersede any statements that we might make as a company, because an employee's health comes first."

The adherence to hybrid, flexible options will remain. "From the CHRO, there is a philosophy that if we're better together, in person, that our relationships matter. Our creativity matters. But we understand that it's not for every situation, either. So how do we balance that? We have some guidelines. Every department has a decision to make." Other departments have elected to return to the physical office or other category of work site. Manufacturing is an obvious example. There are others. However, "my department will not return to a physical office. The work we do does not require our being in physical proximity to each other or the global workforce at GE. Putting us in a room together or in an office together makes little sense," and hers is not the only department at GE to choose WFH.

Gaining Perspective

As expected, there is no one-size-fits all approach to protect the employee experience and set a course for the near future as businesses exit the painful first year and a half of a global pandemic. As 3Sixty Insights' discussions with users reveal, businesses are basing their decisions on how to move forward by taking realistic stock of the characteristics of the workforce. Think of it as the equivalent, for a business, of a personal, individual decision. In all these permutations of the next normal, 3Sixty Insights finds, a learning strategy and technology to drive it play key roles.

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